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Bioprocess Bags Market By Type (2D bioprocess bags, 3D bioprocess bags, Others) , By Workflow (Upstream Process, Downstream Process, Process Development) By End User (Pharmaceutical and Biopharmaceutical Companies, CMOs and CROs, Academic and Research Institute) : Global Opportunity Analysis and Industry Forecast, 2024-2033

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Report description:

The bioprocess bags market was valued at $3.3 billion in 2023, and is projected to reach $14.9 billion by 2033, growing at a CAGR of 16.4% from 2024 to 2033.
Bioprocess bag is a single-use, high-performance bag that is made from high-grade polymers, making it compatible for a wide range of bioprocessing applications such as storage, handling, and transportation of biopharmaceutical fluids, including cell cultures, media, buffers, and other critical materials. These bags are designed to maintain the sterility and reduce the risk of cross-contamination. Their use is rapidly expanding due to the growing demand for single-use technologies, which offer increased efficiency and superior operational flexibility.
The growth of the global bioprocess bags market is majorly driven by surge in demand for biopharmaceuticals, such as vaccines, monoclonal antibodies, and cell therapies as well as increase in adoption of single-use technologies due to their cost-effectiveness and reduced risk of contamination. Studies have shown that the use of bioprocess bags in cell culture processes can reduce the risk of cross-contamination by over 90% compared to traditional stainless steel systems, due to their single-use nature and elimination of complex cleaning procedures. Furthermore, bioprocess bags offer lower capital and operational costs compared to traditional stainless steel systems, including reduced cleaning and validation requirements, which acts as a key driving force of the global market. Moreover, multiple benefits associated with these bags augment the market growth; for instance, they allow for easy and quick scalability in biomanufacturing processes, which is crucial in meeting the growing demand for biologics and personalized medicines. In addition, the demand for vaccines and other biopharmaceutical products, spurred by global health

challenges like pandemics, has increased the reliance on bioprocess bags for efficient production and distribution. The industry is shifting toward the use of sustainable and eco-friendly materials for bioprocess bags, driven by the need to reduce environmental impact and improve the overall sustainability of biomanufacturing processes, which is expected to notably contribute toward the market growth. However, generation of generates a significant amount of plastic waste due to single-use bioprocess bags coupled with rise in concerns about environmental impact and increase in pressure for sustainable disposal methods hamper the market growth. Moreover, potential risk associated with contamination of products due to leachable and extractables from the polymer materials used in bioprocess bags restrain the use of bioprocess bags. On the contrary, continuous advancements in the materials and design of bioprocess bags, such as improved barrier properties and compatibility with a broader range of bioprocessing applications, are expected to offer lucrative opportunities for the market growth during the forecast period. In addition, manufacturers are focusing on improving sterility and maintaining product integrity of bioprocess bags, which will address the critical need for contamination-free production in high-value biologics. Such developments are anticipated to open new avenues for the market growth.

The global bioprocess bags industry is segmented into type, workflow, end user, and region. On the basis of type, the market is bifurcated into 2D bioprocess bags, 3D bioprocess bags, and others. By workflow, it is divided into upstream process, downstream process, and process development. Depending on end user, it is segregated into pharmaceutical & biopharmaceutical companies, CMOs & CROs, and academic & research institute. Region wise, the market is analyzed across North America, Europe, Asia-Pacific, and LAMEA.
Key Findings
By type, the 2D bioprocess bags segment is expected to dominate the market from 2024 to 2033.
On the basis of workflow, the upstream process segment is anticipated to exhibit the highest growth during the forecast period.
Depending on end user, pharmaceutical & biotechnology companies is projected to emerge as the leading segment in the coming years.
Region wise, North America held the largest market share, in terms of revenue, in 2023, and is expected to dominate the market during the forecast period.

Competition Analysis
Competitive analysis and profiles of the major players in the global bioprocess bags market include Thermo Fisher Scientific Inc., Sartorius AG, Merck KGaA, Danaher Corporation, Saint-Gobain Performance Plastics., Lonza Group AG, Eppendorf AG, Meissner Filtration Products, Inc., PBS Biotech, Inc., and GE Healthcare. These major players have adopted various key development strategies such as business expansion, new product launches, and partnerships to sustain the intense competition and gain a strong foothold in the global market.

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Possible Customization with this report (with additional cost and timeline, please talk to the sales executive to know more)

- Additional company profiles with specific to client's interest
- Expanded list for Company Profiles

Key Market Segments

By Type

- 2D bioprocess bags
- 3D bioprocess bags
- Others

By Workflow

- Upstream Process
- Downstream Process
- Process Development

By End User

- Pharmaceutical and Biopharmaceutical Companies
- CMOs and CROs
- Academic and Research Institute

By Region

- North America
- U.S.
- Canada
- Mexico
- Europe
- France
- Germany
- Italy
- Spain
- UK
- Rest of Europe
- Asia-Pacific
- China
- Japan
- India
- South Korea
- Australia
- Rest of Asia-Pacific
- LAMEA
- Brazil
- South Africa
- Saudi Arabia
- Rest of LAMEA
- Key Market Players
- Thermo Fisher Scientific Inc.
- Sartorius AG
- Merck KGaA
- Danaher Corporation
- Saint-Gobain Performance Plastics.
- Lonza Group AG

- Eppendorf AG
- Meissner Filtration Products, Inc.
- PBS Biotech, Inc.
- GE Healthcare

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